

Managing Applicants in PeopleSoft



Reference Guide

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**UNIVERSITY OF
CALGARY**

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Introduction

This reference guide contains information that will help you make use of the Manage Applicant features in PeopleSoft.

The ability to manage job applicants is available to Reports to Managers and those administrators who have obtained the *Faculty/Unit Recruitment Administrator* role via a PeopleSoft access request. In addition to having the appropriate role, you must also be added as a primary or secondary hiring manager on a job to be able to view the job and the applicants associated to it. Once a job has been posted internally or externally, all applicants can be easily reviewed and managed from a single location.

This guide will take you through the following functions within the Manage Applicants module in PeopleSoft:

- Navigating the Manage Applicants menus
- Viewing applications and resume information
- Viewing service dates for support staff (AUPE) jobs
- Updating an applicant’s disposition
- Forwarding a candidate’s resume
- Emailing candidates

If you require assistance with the Manage Applicant functions, contact your [Advisor, Talent Acquisition](#) for assistance.

Navigating Manage Applicants in PeopleSoft

Topic 1: Access Manage Applicants Menu

1. From the myUofC portal, click **My work**.
2. Under the **People management** header, click **Manage applicants**.

The **Browse Job Openings** screen is displayed.

1.

Dashboard ▾			All about me			My work		
People management			Finance & Supply Chain			Travel		
Manager self service			Payment Selector Tool			Policy & procedures		
Job opening request			Create a Payment Request			Travel & expense ca		
Template-based hire			Create expense report			Book travel		
2. Manage applicants			Manage expenses			International travel &		
My team learning			Create requisition			Team travel		
Job Profile Database			Manage requisitions			Mobile phone roamir		
Onboarding checklists			Pending approvals			Vehicle Rentals		



Topic 2: Browse Job Openings

The Browse Job Openings screen displays a list of all job openings, past and present, for which you have been listed as a contact. Depending on how often you are involved in the hiring process, the number of postings listed will vary.

All jobs are displayed in the Job Openings window.

There are a number of options available to you on this screen, allowing you to personalize content and easily find the information you are looking for.

6 matches found.

Job Openings									
Job ID	Posting Title	Category	Recruiting Location	Department	Business Unit	Days Open	Status	No Action Taken	Total Applicants
9930	Utilities & Distribution Elect...	<input type="checkbox"/>	Main Campus	EUD	UCALG - Operating	127	010 Open	124	121
9867	Part-Time Caretaker, Facilitie...	<input type="checkbox"/>	Main Campus	Caretaking - Area 1	UCALG - Operating	135	010 Open	42	48
9260	Utility Dist Electrician	<input type="checkbox"/>	Main Campus	EUD	UCALG - Operating		110 Filled/Closed	0	1
7845	Utility & Distribution Electri...	<input type="checkbox"/>	Main Campus	EUD	UCALG - Operating		110 Filled/Closed	0	37
7545	Utility & Distribution Electri...	<input type="checkbox"/>	Main Campus	EUD	UCALG - Operating		120 Canceled	0	11
5595	Jr. Building Mangement Systems...	<input type="checkbox"/>	Main Campus	Energy Management	UCALG - Operating		110 Filled/Closed	0	11

You are able to filter the results using the options along the left side of the page.

Filter options include:

- **Status** (e.g. Filled, Open, Cancelled)
- **My Association** (Primary or secondary hiring manager)
- **Department**
- **Hiring Manager**
- **Recruiter**
- **Job Family**
- **Recruiting Location**
- **Created In** (year job opening was created)

Filter by

Status
 110 Filled (3)
 010 Open (2)
 120 Canceled (1)

My Association
 Hiring Manager (6)
 Primary Hiring Manager (3)

Department
 EUD (4)
 Caretaking - Area 1 (1)
 Energy Management (1)

These options allow you to easily narrow your results to find the job opening you are looking for.

1. Each of the columns on this screen can be sorted using by clicking on the column header.
 - Clicking a column header **once** will sort the column alphabetically or numerically in **ascending order**.
 - Clicking a column header **twice** will sort the column alphabetically or numerically in **descending order**.

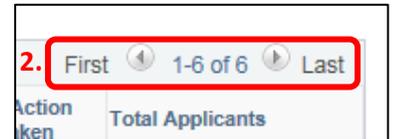
6 matches found.

1. Job Openings

Job ID	Posting Title	Category	Recruiting Location	Department	Business Unit	Days Open	Status	No Action Taken	Total Applicants
9930	Utilities & Distribution Elect...	<input type="checkbox"/>	Main Campus	EUD	UCALG - Operating	127	010 Open	124	121



- If you have a large number of job postings, there may be multiple pages for you to review. You can navigate between multiple pages using the arrow buttons in the top right corner of the Job Openings window.



- To access a job opening, click on the title of the job you wish to view (e.g. Part-Time Caretaker, Facilities).

Job ID	Posting Title	Category	Recruiting Location	Depart
9867	3. Part-Time Caretaker, Facilitie...	<input type="checkbox"/>	Main Campus	Caret
9930	Utilities & Distribution Elect...	<input type="checkbox"/>	Main Campus	EUD
5595	Jr. Building Mangement	<input type="checkbox"/>	Main Campus	Energ

The **Manage Job Opening** page is displayed. To learn more about the Manage Job Opening page, proceed to **Topic 3** in this guide.

Topic 3: Sorting or Filtering your Applicant List

- Under the **Applicants** section, you can easily sort applicants by clicking on the column header.
 - Clicking a column header **once** will sort the column alphabetically or numerically in **ascending** order.
 - Clicking a column header **twice** will sort the column alphabetically or numerically in **descending** order.

Select	Applicant Name	Applicant ID	Type	Disposition	Application	Resume	Mark Reviewed	Reject	Last Updated
<input type="checkbox"/>	Ann B Luten	140277	Employee	Reviewed					2016/06/03 8:48AM

- To filter applicants based on their status, you can click on the disposition tabs across the top of the **Applicants** window.

All (49)	Applied (42)	Reviewed (3)	Screen (0)	Route (0)	Interview (0)	Offer (0)	Hire (0)	Hold (0)	Reject (4)
----------	--------------	--------------	------------	-----------	---------------	-----------	----------	----------	------------

- The Applicants section of the Manage Job Openings page only displays 25 results at one time. To view additional results, you can navigate between multiple pages using the arrow buttons in the top right corner of the Applications section.

Hold (0)	Reject (4)
First 1-25 of 49 Last	
2016/06/03 8:48AM	Other Actions
2016/05/24 10:58AM	Other Actions

Topic 4: View Resume

- To view a candidate's resume, from the **Manage Job Opening** screen, click the **Resume** button (📄) under the **Resume** column.

Applicants ?						
Select	Applicant Name	Applicant ID	Type▲	Disposition	Application	Resume
<input type="checkbox"/>	Ann B Luten	140277	Employee	Reviewed		1.
<input type="checkbox"/>	Richard Osei-Appiah	69554	Employee	Reviewed		

- Depending on the format of the resume, it will most likely open in one of two ways:
 - If the resume is in a **PDF** format, it will open in a **new tab/window***.
 - If the resume is in a **Microsoft Word** format, it you will be prompted to **save or open** the file on your computer.

Topic 5: View Application and Service Date Information

- View a candidate's application information by clicking the **View Application Details** button (📄) under the **Application** column.

Applicants ?					
Select	Applicant Name	Applicant ID	Type▲	Disposition	Application
<input type="checkbox"/>	Ann B Luten	140277	Employee	Reviewed	1.

The **View Application Details** page opens in a new tab/window*. Within this window, you can view the candidate's name, contact information, and their responses to the standard questions asked as part of the application.

- To view the applicant's answers to standard questions asked as part of the application process, click the **View Questionnaire** link under the **Job Openings** section, which will open in a new window*.

Job Openings ?			Personalize Find View All	First 1 of 1 Last
Job Opening ID	Posting Title	View Questionnaire		
9867	Part-Time Caretaker, Facilities	2.		

Job Families ?			Personalize Find View All	First 1 of 1 Last
Job Family				

***Note:** If the page does not open, you will likely need to adjust your computer's browser settings to allow pop-ups. Contact the IT Help Desk at 220-5555 if you require assistance.



USEFUL TIP: Under the AUPE Collective Agreement, the employee with the most seniority who meets the minimum qualifications of a job must be granted an interview (*Article 42.05*). In addition, any employee who is on redeployment should be given preferential consideration over other candidates for a position (*Article OP40.05*).

To support the above obligations for support staff (AUPE) job openings, always check the AUPE's service date information and whether or not any applicants are currently on redeployment.

3. If the candidate is an eligible AUPE employee, you can view their **Service Date** within the first section of the **View Application Details** screen.
4. If the AUPE employee is currently on redeployment, in addition to their **Service Date**, you will also see **Redeployment** marked as 'Yes' as well as their **Redeployment End Date** listed.

View Application Details	
Name Ann B Luten	Preferred Contact Not Specified
Applicant ID 140277	Phone 403/555-4422
Applicant Type Employee	Email
Status 010 Active	Address 348 Sims Street NW Regina SK S2O 2L3
Employee ID 04174253	Redeployment Yes
Service Date 02 October 2000 3.	Redeployment End Date 22 July 2016 4.

If the Service Date field is blank, that employee does not have AUPE seniority as it pertains to *Article 42.05* and you can move to the next applicant. If, however, a date does display, take note of the date and move to the next internal applicant.

For any employee who is currently on redeployment (*Article OP40.05*), their service date will display, and the Redeployment box will be checked along with the End Date. Contact your [Advisor, Talent Acquisition](#) for more information on the steps you should take.

USEFUL TIP: While you are not able to sort employee applications by service date, your [Advisor, Talent Acquisition](#) can run a report for a specific job posting that lists all applicants by service date.

5. Close the **View Application Details** tab/window to return to the **Manage Job Openings** screen.

Topic 6: Update Applicant Status

Applicant status is a candidate's standing relative to a specific job opening. For example, a candidate will initially appear in 'Applied' status, and can be updated to 'Reviewed' or 'Reject' status as the recruitment process unfolds. Applicant status is referred to as **Disposition** in our system.

It is important to note that an applicant's status or disposition is not unique to each hiring manager, therefore it is required that one individual manage the status of all the applicants to avoid confusion. In general all applicants will appear as 'Applied' initially, unless someone has completed an initial screening of applications.

Once a hiring manager has reviewed the applicants for their job, they should update the disposition status of those applicants moving forward in the recruitment process (e.g. from **Applied** to **Interview**). Hiring managers are not required to update the status of those applicants not selected, though they have the ability to do this should they so choose, in order to help organize the applicants.

To mark an application as reviewed, or to reject an application, there are quick links located within the table on the Manage Job Opening screen.

1. To mark an application as reviewed, click the **Mark Reviewed** () button.
2. To mark an applicant as rejected, click the **Reject** () button.

	1. 	2. 	2016/02/16 9:50PM
			2016/02/16 3:32PM
			2016/02/16 12:09PM

For all other dispositions, or to reverse a disposition change, use the following process:

3. Click on the **Other Actions** dropdown menu for the applicant you wish to edit.
4. Click **Recruiting Actions**.
5. Click **Edit Disposition**.

Hire (0)	Hold (0)	Reject (4)
Find View All  First 1-25 of 49 Last		
Reject	Last Updated	
	2016/06/03 8:48AM	3.  Other Actions
	2016/05/24 10:58AM	4.  Recruiting Actions
	2016/02/10 5:10PM	Applicant Actions
	2016/02/15 12:43PM	5.  Edit Disposition

The **Edit Disposition** pop-up appears.

6. Click on the **New Disposition** dropdown menu and select the appropriate disposition status (e.g. Interview).
- Note:** The **Status Reason** dropdown is not used when editing the disposition.
7. (Optional) The date defaults to today's date. If necessary, you can modify the date that the new disposition takes effect.
 8. Click **Save**.

Edit Disposition Help

Current Disposition 020 Reviewed

*New Disposition ▼ 6.

Status Reason ▼

Date 2016/06/24  7.

8. Save Cancel

You are returned to the **Manage Job Opening** page.

Topic 7: Forwarding an Applicant's Resume

Hiring managers have the ability to forward applicant resumes to other individuals involved in the selection process who don't have access to view applicants for that job in PeopleSoft, through the use of the Forward Applicant function.

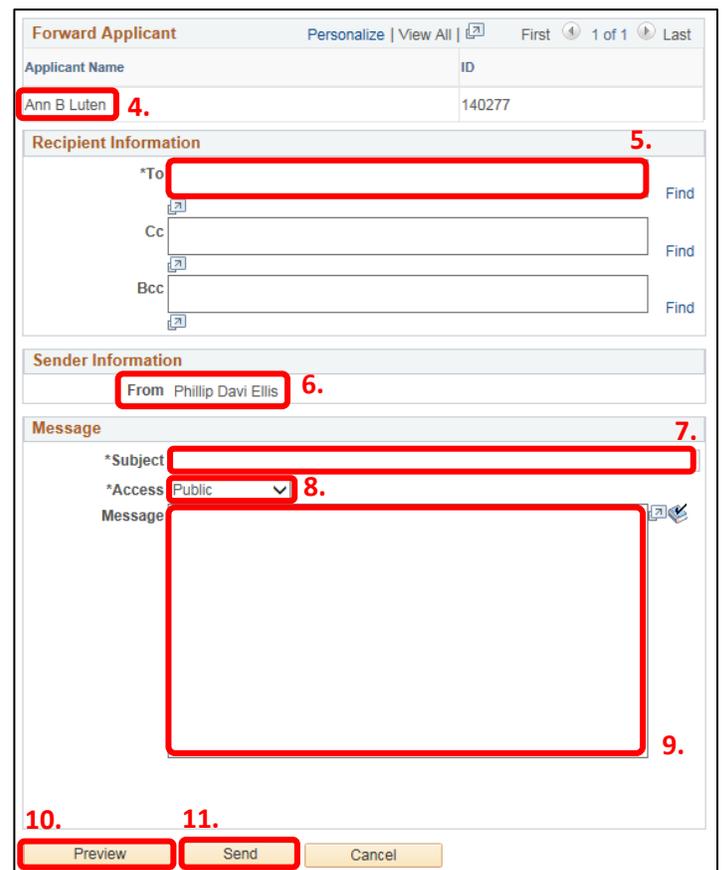
USEFUL TIP: If you would like to forward an application to another manager to consider the applicant for another role, look at the questionnaire under their application to verify they answered "Yes" to the question, "Are you interested in being considered for other positions at the University of Calgary?".

1. Click on the **Other Actions** dropdown menu for the applicant you wish to forward.
2. Click **Applicant Actions**.
3. Click **Forward Applicant**.



The **Forward Applicant** window is displayed.

4. Confirm that the **Applicant Name** is correct.
5. Enter the recipient's email address in the **To** field. Individuals can be added under the CC or BCC field as appropriate.
6. Confirm your name appears in the **Sender Information** field. The email sent will be from your UCalgary email address.
7. Enter a **Subject** to indicate the purpose of your email.
8. Confirm the **Access** field is defaulted to **Public**.
9. Enter the desired information into the **Message** field (e.g. 'Please find attached the resume for the shortlisted candidate being considered for Job X').
10. You can preview the email by selecting the **Preview** button. Note that the applicant's resume will not appear in the preview, however it will be attached when the email is sent.
11. To forward the applicant, click **Send**.



A screenshot of the 'Forward Applicant' window. The 'Applicant Name' field is filled with 'Ann B Luten' and 'ID' is '140277'. The 'Recipient Information' section has the 'To' field empty. The 'Sender Information' section has 'From' set to 'Phillip Davi Ellis'. The 'Message' field is empty. At the bottom, there are 'Preview', 'Send', and 'Cancel' buttons. Red boxes and numbers 4 through 11 highlight these elements.

You are returned to the **Manage Job Opening** screen.

USEFUL TIP: You can forward multiple applicants in one email. See [Topic 9: Performing Group Actions](#) for more info.

Topic 8: Emailing an Applicant (Send Correspondence)

Hiring managers can send email to applicants directly through PeopleSoft using the **Send Correspondence** function.

1. Click on the **Other Actions** dropdown menu for the applicant you wish to correspond with.
2. Click **Applicant Actions**.
3. Click **Send Correspondence**.

The **Send Correspondence** window is displayed.

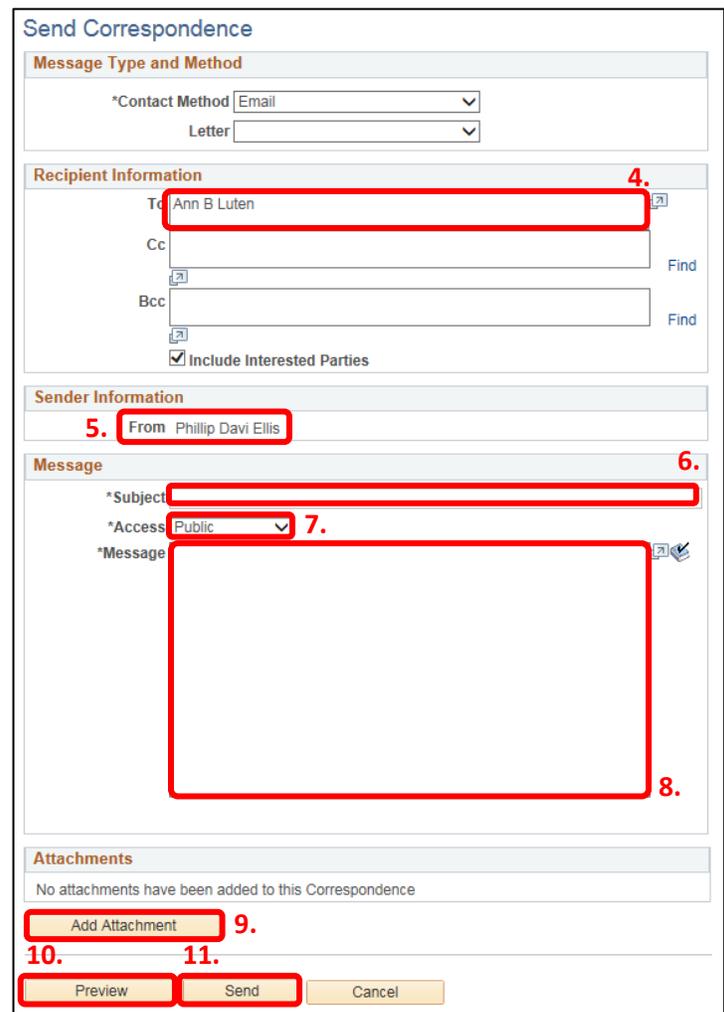
4. Confirm the name of the applicant appears in the **To** field. In the event that you are corresponding with more than one applicant, each person will receive an individual email addressed to them only.
5. The Sender Information auto populates based on your login information. Confirm your name appears in this location.
6. Enter a **Subject** to indicate the purpose of your email.
7. Confirm the **Access** field is defaulted to **Public**.
8. Enter the desired information into the **Message** field.
9. (Optional) If you wish to add an attachment to the email, click the **Add Attachment** button. Once clicked, you can browse for a document on your computer and upload it to the message.
10. You can preview the email by selecting the **Preview** button. Note that the applicant's resume will not appear in the preview, however it will be attached when the email is sent.
11. To send the email to the applicant, click **Send**.

You are returned to the **Manage Job Opening** screen.

USEFUL TIP: You can send email to multiple applicants at the same time. See [Topic 9: Performing Group Actions](#) for more information. Using the Group Action function will send each selected candidate an individual email.



This screenshot shows a table of applicants with a dropdown menu open for the first row. The dropdown menu has three options: 'Other Actions', 'Applicant Actions', and 'Forward Applicant'. The 'Applicant Actions' option is selected, and a sub-menu is visible with 'Send Correspondence' highlighted. Red boxes and numbers 1, 2, and 3 indicate the steps: 1. Click on the 'Other Actions' dropdown menu, 2. Click 'Applicant Actions', and 3. Click 'Send Correspondence'.



This screenshot shows the 'Send Correspondence' window. The 'Message Type and Method' section has 'Email' selected for 'Contact Method' and 'Letter' for 'Letter'. The 'Recipient Information' section has 'To: Ann B Luten' entered. The 'Sender Information' section has 'From: Phillip Davi Ellis' entered. The 'Message' section has a subject line, 'Access' set to 'Public', and a large text area for the message. The 'Attachments' section has an 'Add Attachment' button. At the bottom, there are 'Preview', 'Send', and 'Cancel' buttons. Red boxes and numbers 4 through 11 indicate the steps: 4. Recipient Information, 5. Sender Information, 6. Message, 7. Access field, 8. Message field, 9. Add Attachment button, 10. Preview button, and 11. Send button.



Topic 9: Performing Group Actions

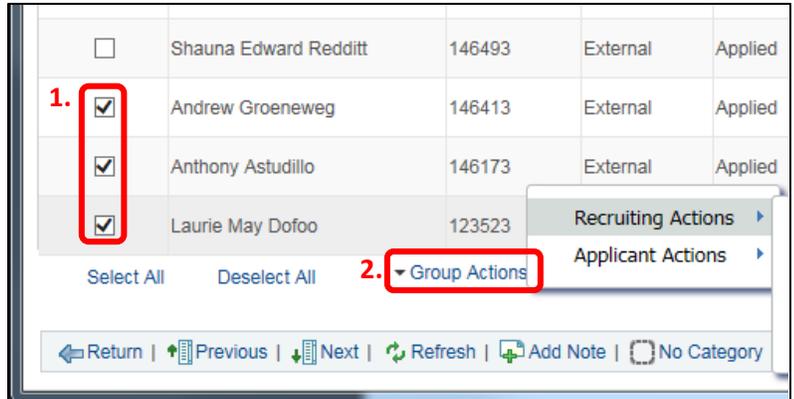
In situations where a group of applicants need to be updated for the same reason, you can use the **Group Action** option.

To perform a group action, follow these steps:

1. Click the boxes to the left of the applicants' names that you would like to include in the group action (or use the Select All option at the bottom of the applicant list).
2. Click the **Group Actions** dropdown at the bottom of the screen.
3. Select the action you would like to perform. Options under **Recruiting Actions** include:
 - Mark Reviewed (see [Topic 6: Update Applicant Status](#))
 - Reject Applicant (see [Topic 6: Update Applicant Status](#))
 - Withdraw Application (discuss with your Recruiter)

Under **Applicant Actions** you will find:

- Forward Applicant (see [Topic 7: Forwarding an Applicant's Resume](#))
- Send Correspondence (see [Topic 8: Emailing an Applicant](#))



4. Depending on the type of action you are performing, you may be asked to confirm the action, or complete additional steps. Complete the additional steps or confirm as required.